

# California Board of Accountancy

## CE REPORT

This form is provided as a worksheet. A completed CE Report form for active renewal must be submitted with a renewal form, which a licensee will receive approximately two months prior to the license expiration date.

Licensee Name: \_\_\_\_\_ License Number: \_\_\_\_\_

(See "Renewal Information and Instructions" for more information regarding this form.)

☐ Mark here if either of the following occurred within the two years preceding your license expiration date:  
 1) Initial license was issued. 2) License status was converted from inactive to active.

1	2	3	4	5	6	7	8
<b>COURSE TITLE</b> <small>(For clarity, please avoid abbreviations)</small>	<b>SUBJECT CODE</b>	<b>CLAIMED AS GOV'T CE</b>	<b>(v)</b> <b>DATE(S) COMPLETED</b> <small>(Must be completed to list)</small>	<b>HOURS CLAIMED</b>	<b>NAME OF PROVIDER</b>	<b>PROVIDER CODE</b>	<b>METHOD OF PRESENTATION</b>
<b>Board-approved PC&amp;E course:</b>							
COURSE TITLE: _____  APPROVAL NUMBER: _____	E						
<b>Accounting &amp; Auditing courses:</b>							
	A						
	A						
	A						
	A						
<b>Subtotal of A&amp;A hours:</b>							
<b>List all other CE courses below:</b>							
<b>TOTAL HOURS CLAIMED:</b>							

If additional space is needed, this form may be reproduced. See codes on next page.

Please enter the appropriate code as follows:

**SUBJECT CODE (Column #2)**

- A - Accounting & Auditing courses: Financial reporting, financial auditing, accounting and auditing for specialized industries, etc.
- B - Technical business courses: General business, management advisory services, and industry-related business courses, etc.
- C - General purpose computer training: Word processing, database, operating systems, spreadsheets; e.g., Excel, Quattro Pro.
- E - Professional Conduct & Ethics courses.
- P - Personal development/behavioral courses: Oral and written communications, social environment of business, administration of an accounting practice, leadership, conflict resolution, etc.
- S - Tax software courses e.g., Turbo Tax, LaCerte, FastTax, etc.
- T - Taxation courses: e.g., tax law updates, estate planning, S corporations.

**PROVIDER CODE (COLUMN #7)**

- PO - Professional organization; AICPA, CSCP, SCA, etc.
- CT - Commercial training/education company.
- UC - University/College.
- IH - Firm in-house training.
- OT - Other

**METHOD OF PRESENTATION (COLUMN #8)**

- T - Teaching: as an instructor or a discussion leader. For each hour of presentation, 2 hours of actual preparation time may be claimed; total teaching hours cannot exceed 50% of required hours.
- L - Live presentation with instructor or discussion leader.
- N - Non-interactive self-study: requires credit from sponsor.
- I - Interactive self-study: Computer provides feedback throughout.
- P - Author of published books/articles: Cannot exceed 25% of required hours.

**NOTE: Group study without a qualified discussion leader does not qualify as acceptable CE.**